



Valet VITA FAQ 2023

What does VITA stand for?

Volunteer Income Tax Assistance. Tax certified volunteers prepare free tax returns for individuals and families with a household income of less than \$73,000.

It is a program run by the United Way of Southern Arizona (UWTSA) in partnership with the IRS. The United Way partners with different organizations like the Pima County One Stops and libraries to have many locations across Pima County.

We prepare and e-file your Federal AND State tax returns. For free.

How much can I save?

VITA is FREE. On average, most people save \$250 to \$300 by using VITA. VITA volunteers are trained to make sure that you get all the tax credits that you're eligible for.

How is Valet VITA different than regular VITA?

Valet VITA is free tax assistance for busy people.

We understand that you might not have time to visit a traditional VITA tax preparation site. Rather than waiting in a long line, you can bring in your information to a Valet VITA site. These sessions usually take approximately 30 minutes so you can avoid long wait times.

Your information goes into a queue to be prepared remotely by an IRS-certified volunteer tax preparer. **This process can take 2-3 weeks.** Then you are notified that your return is complete. You review and approve the return via text or email and your tax returns are submitted electronically for you, for FREE.

Can anyone use VITA?

Anyone with a family income of \$73,000 or less can use VITA. Some exceptions apply. You can check your eligibility at: <https://www.unitedwaytucson.org/vita>.

If you are **active** military, please use VITA on the Davis-Monthan Air Force Base.

What documents do I need to bring?

It is really important that you bring all the necessary documents. If you don't, you may have to come back. Those documents are:

1. Picture I.D. for taxpayer and spouse. **NOTE: Both spouses must be present!**
2. Social Security card for **EACH** family member, including dependents.
3. Proof of income, including W2s and 1099s.
4. Account and routing numbers for direct deposit of refunds.
5. Documentation of expenses. (if applicable)
6. Forms 5498-SA and 1099-SA for Health Savings Accounts.
7. 1095A if anyone on the return is insured through the Marketplace.
8. Your prior year's tax return. (Optional)

Can I make an appointment for Valet VITA? This year it is walk in service only and people will be served on a first come, first served basis.

How do I approve my tax return?

Once the tax return is completed, **you must review and approve it** before it can be filed.

- A volunteer will call you to review the return. **We CANNOT file the return until we speak with you.**
- After you review and approve, you will be asked to sign electronically through text or email.

How do I know my taxes are being done correctly?

All UWTSa VITA volunteers complete our advanced tax preparation training and have completed the required IRS tax certification test.

Each return prepared at a VITA site is seen by TWO volunteers, one to prepare the return and one to review it for accuracy. This level of expertise is often higher than using a paid tax service.

Do you do my state taxes too? Yes, we file Federal **and** State taxes.

I want to do my own taxes. Can you help?

Yes, there will be three DIY workshops from 5:30 to 7:30 at the Kino One Stop on February 9, March 2 and March 15. An instructor will walk you through how to prepare your own taxes. Be sure to bring all your tax documents with you.

Seats are limited, so please visit www.unitedwaytucson.org/vita to **RSVP** for one of these sessions.

If I'm getting a refund, do I need a bank account?

No, you can have your refund returned these two ways:

- You can have your refund mailed to you in the form of a check, but the IRS has experienced significant delays in processing refunds,
- Or we can sign you up for a prepaid debit card to use for direct deposit of your refund.

Remember, if you already have a bank account, you will need your routing and account information.

I'm most comfortable speaking Spanish? Where can I go?

Pima County's Valet VITA site has Spanish services available. Other VITA sites may offer Spanish services, visit www.unitedwaytucson.org/vita to find out which ones.

What are the most important things that I need to know?

- Be sure to bring all your documents with you.
- If filing jointly, both spouses must be present
- You **MUST** have social security cards for each person listed on the return
- Be sure to answer your phone and/or messages, it could be a VITA volunteer attempting to reach you for more information or to complete the review of your return!
- Remember: VITA volunteers work hard to provide this **FREE** service to the community. Valet VITA can take 2-3 weeks to complete. For a complete list of VITA locations and services, please visit www.unitedwaytucson.org/vita.

More questions? Contact: United Way of Tucson's VITA team at: www.unitedwaytucson.org/vita